
New York State
Electronic Certificate of Need
Applicant Training:
Request Regional Office Review
Version 2.0

Revision History

Date	Version	Description	Author
04/20/2015	1.0	Initial Release	Payal Sareen
07/15/2015	2.0	Release 2: General information Functionality - with enhancements <ul style="list-style-type: none"> • Screen layout changed • Phase ID can be manually changed • Federal 855 does not default to yes or no. • Federal 855 expiration date field added • Data can be modified after submission Reviewer Schedules surveys- <ul style="list-style-type: none"> • Schedule, reschedule and confirm functionality provided Changes in Survey schedule history table Added Secure and Non- secure general correspondence Added checklist functionality and checklist correspondence Correspondence can be filtered for focused search	Payal Sareen

NYS Department of Health

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Applicant initiates regional office review

Regional office tab has been added to NYSE-CON to facilitate the Regional office review and approval. The views and actions available will depend on the user's role. To be able to login to – NYSE-CON, the user must have a Health Commerce System (HCS) account. The Regional Office module is reached via the 'Regional office' tab. This tab opens the "General Information" page for the Regional Office (Figure 1).

The "Regional Office" tab will be displayed for a project only after the CON project has been

Approved and any contingencies have been satisfied The applicant should initiate contact with the Regional Office at least 60 days prior to the facility's target opening date.

The "Regional Office" tab will be located between the "Post Approval" and "Summary" tabs.

Projects **My Projects**

Project Search > Project Search Results

Regional Office

General | Executive Summary | Application | Correspondence | Decision | Contingencies | Post Approval | **Regional Office** | Summary

Application Number: 141059
 Facility Name: Adirondack Medical Center-Lake Placid Site
 Project Description: Decertify two (2) medical/surgical beds resulting in a provider based off-campus emergency department to operate on a part-time basis

My NYSE-CON Tool Bar
 Create New Submission

Selected Projects
 CON 141059 - Adirondack Medical Center

Related Projects
 CON 770210 - Placid Memorial Hospital I
 CON 890631 - Placid Memorial Hospital I

General Information

Phase 1

General Information | Correspondence

*Phase ID: 1 (e.g. 1a, 1(a),1(i) ,2b)
 *Phase Description:
 Federal Tax ID #: (If Applicable)

Contacts

Name	Title	Company	Office Phone	Mobile Phone	Email	NOA
Add Contact						

**All Dates in MM/DD/YYYY format

*Target Opening Date: From: To: †Requested Survey Dates: †Applicant's Name/Date

†Federal 855 required? Yes No Approved Date: Expiration Date: **Date as provided by CMS

Survey

Type	Required	Scheduled Date	Confirm Date	Reviewer
Environmental				
Clinical				
Administrative				

Save Clear Submit

* Fields marked with an asterisk (*) are required for saving information from this screen.
 * Fields marked with a dagger (†) are required to proceed with the submission process.

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Figure 1: Regional office: General Information page

General Information Page - Field Descriptions	
Field Name	Description
Application Number	CON number Assigned to the application
Facility Name	Name of the facility
Project description	The description entered by Project Management Unit (PMU) during initial review
Phase Tab	Every project has at least one phase but more phases may be added. Surveys, checklists and Findings and Caps organized by phase.
General Information Tab	Tab Title
Phase ID	The phase number to identify the phase. A sequential number is assigned at creation by may be changed by the user.
Phase Description	A general description of the phase entered by the applicant.
Federal tax ID #	It is the 9 digit Federal Tax Identification number
Contacts	Label for Survey table
*Target Opening date	The date on which the facility is expected to be open for services. Note: Target opening date must be greater than Requested Survey Date.
*Requested survey Date 'From'	The date entered by the applicant to provide the beginning date of a range to schedule a survey. The date must be earlier than the 'Target opening date' entered
*Requested survey Date 'To'	The date entered by the applicant to provide the end date of a range to schedule a survey. The date must be earlier than the 'Target opening date' entered
Federal 855 required?	Radio buttons to indicate if a Federal 855 is required.
*Approved Date	This field indicates the date on which the Federal 855 was approved.
Expiration date	This field indicates the date on which the Federal 855 was expired. The date is provided by CMS.
Buttons	
Add Contact Button	Button used for navigating the user to the "Add New Contact Information" screen.
Submit	Sends a notification to the Regional Office that the applicant is requesting regional office review. Once the button is clicked, the only functionality available to the user would be 'Add contact'.
Clear	Clears any unsaved data
Save	Entered and selected data is saved but the information may be modified and the regional office does not receive a notification .
Tables	
Contacts	Table listing the details of the 'Primary' and 'Additional' contacts, entered by the applicant, as the contacts to facilitate the regional office review.
Survey	Table containing survey options, and when applicable survey dates and reviewer name.

**Dates must be entered in month-day-year order format. If entered dates are punctuated by slashes: The year must have either two or four digits (examples: 02/01/2011 or 02/01/11). – Entry of a two-digit year implies current century. – Month and day may be entered without leading zeros (example: 2/1/2011)*

Submitting a request for review

Submitting a review request to the Regional office

Only an applicant can initiate the request for regional office review

Having received a “Contact the Regional Office” direction, the applicant will access the Regional Office General Information page by selecting the Regional Office tab for the project.

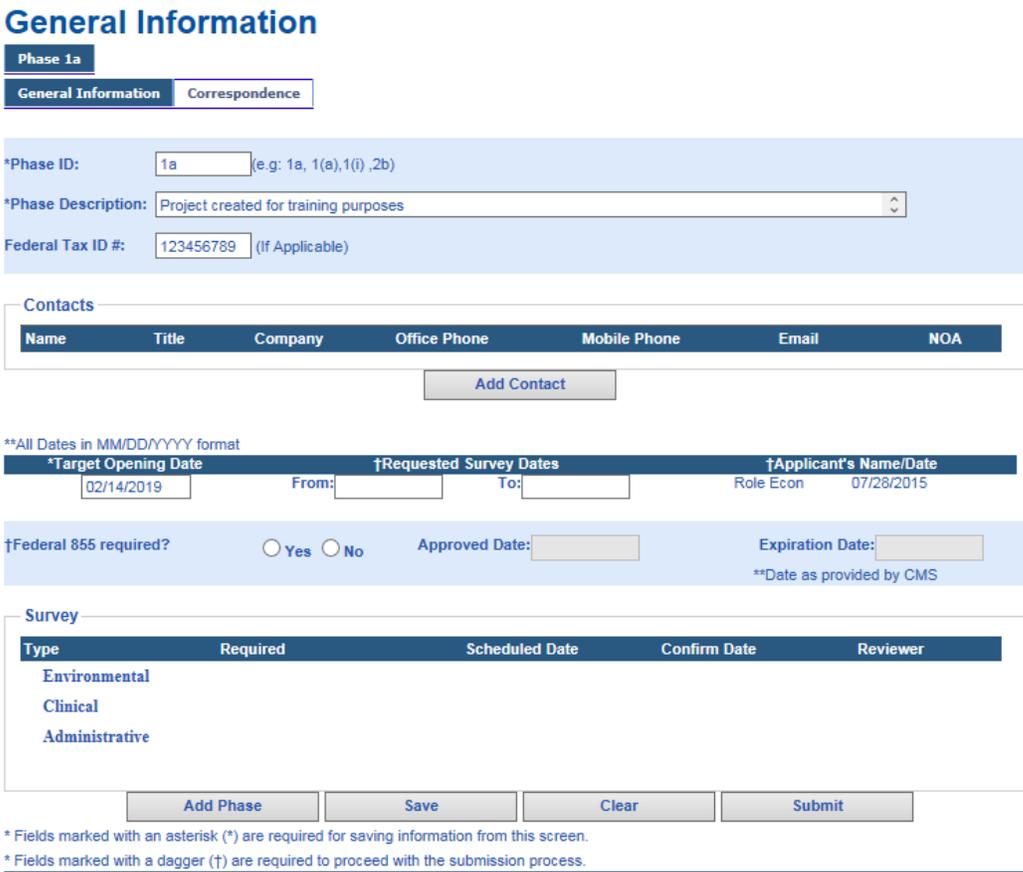
In order to submit a request for review, the applicant must do the following:

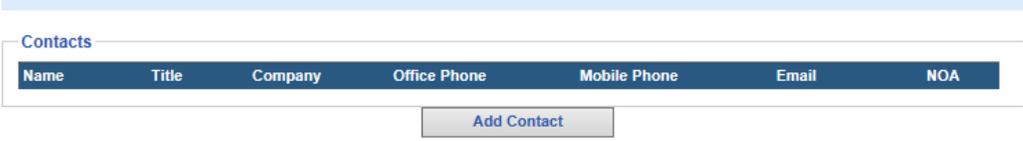
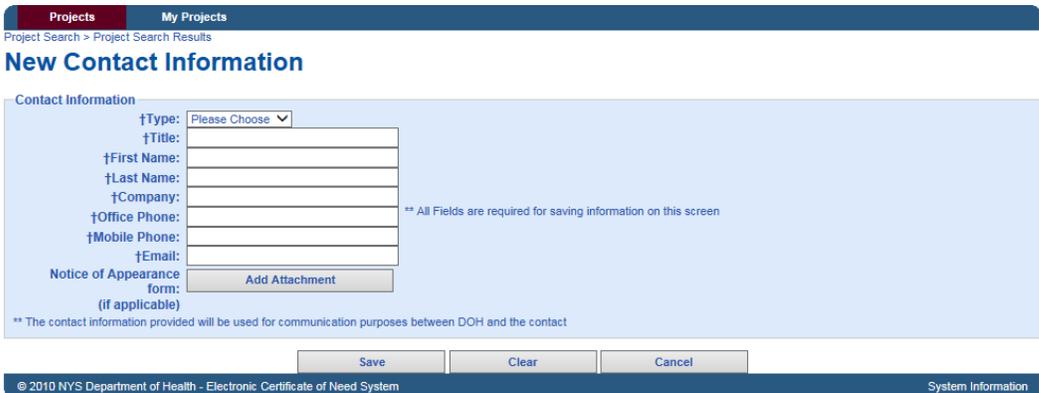
- Create a phase
- Provide contact details for the project
- Provide Survey date range
- Indicate Federal 855 requirement and provide the related information.

Refer to Figure 1 above for the screen and table above for the field descriptions

Create a Phase

Learning Objective	Step	Action
<p>How to Create and Save a Phase</p>	<p>1</p>	<p>On the Regional Office tab, find the Phase 1 tab containing the General Information and Correspondence tabs.</p> <p>Figure 2: Creating a Phase</p>

<p>2</p>	<p>1> Edit the Phase ID, if desired. 2> Enter the Phase Description. 3> Enter the Federal Tax ID # (If applicable). 4> Enter the Target Opening Date.</p>																																		
<p>3</p>	<p>Click Save button to save the phase</p>  <p>General Information</p> <p>Phase 1a</p> <p>General Information Correspondence</p> <p>*Phase ID: 1a (e.g: 1a, 1(a),1(i) ,2b)</p> <p>*Phase Description: Project created for training purposes</p> <p>Federal Tax ID #: 123456789 (If Applicable)</p> <p>Contacts</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Title</th> <th>Company</th> <th>Office Phone</th> <th>Mobile Phone</th> <th>Email</th> <th>NOA</th> </tr> </thead> <tbody> <tr> <td colspan="7" style="text-align: center;">Add Contact</td> </tr> </tbody> </table> <p>**All Dates in MM/DD/YYYY format</p> <p>*Target Opening Date 02/14/2019 From: To: †Requested Survey Dates †Applicant's Name/Date Role Econ 07/28/2015</p> <p>†Federal 855 required? <input type="radio"/> Yes <input type="radio"/> No Approved Date: Expiration Date: **Date as provided by CMS</p> <p>Survey</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Required</th> <th>Scheduled Date</th> <th>Confirm Date</th> <th>Reviewer</th> </tr> </thead> <tbody> <tr> <td>Environmental</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Clinical</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Administrative</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p>Add Phase Save Clear Submit</p> <p>* Fields marked with an asterisk (*) are required for saving information from this screen. * Fields marked with a dagger (†) are required to proceed with the submission process.</p> <p style="text-align: center;"><i>Figure 3: Saving a Phase</i></p> <p>*Alternatively, clicking Add Contact button will also save the phase and navigate to the New Contact Information screen at the same time. The user can then add the contacts associated with the project. On clicking Save, the functionality to Add Phase will be activated. <u>Conditions that apply:</u> The Phase Description, and Target Opening Dates are mandatory fields and must be completed in order to create a phase and save it. Once a phase has been created, the user can save the information without submitting it.</p>	Name	Title	Company	Office Phone	Mobile Phone	Email	NOA	Add Contact							Type	Required	Scheduled Date	Confirm Date	Reviewer	Environmental					Clinical					Administrative				
Name	Title	Company	Office Phone	Mobile Phone	Email	NOA																													
Add Contact																																			
Type	Required	Scheduled Date	Confirm Date	Reviewer																															
Environmental																																			
Clinical																																			
Administrative																																			
<p>4</p>	<p>To clear any unsaved data Click Clear</p> <p>Note: If information has been 'Saved' then the entered data can be cleared by placing the cursor in the field and clearing the information using the Backspace/ Delete keys from the keyboard.</p>																																		

Add Contacts Learning Objective	Step	Action
<p>How to Add a contact</p>	<p>1</p>	<p>On the Regional Office General Information page, Click the Add Contact button</p>  <p style="text-align: center;"><i>Figure 4: Add Contact –General Information page</i></p> <p>New Contact Information screen displays</p>  <p style="text-align: center;"><i>Figure 5: New Contact Information</i></p>

2 On the New Contact Information page, from the contact **Type** drop down list, select **Primary** in type.
 **When the first contact is being added, the only contact designation option available is 'Primary', 'Additional' will be available thereafter.

Figure 6: Contact type

Conditions that Apply:

- There must be at least one contact designated as 'Primary'.

3 Enter **First Name** of the contact

4 Enter **Last Name** of the contact

5 Enter **Company** name

6 Enter **Office Phone** number
 * Entered phone numbers must be a valid 10-digit phone number format: (###) ###-####.

7 Enter **Mobile Phone** number (*As above)
 *If the contact does not have a mobile number- one can enter the same number as "Office Phone" or any digit repeated 10 times on any sequential numbers entry e.g.: 222-222-2222 the reviewer will know that the mobile number a random entry.

8 Enter **E-mail** address

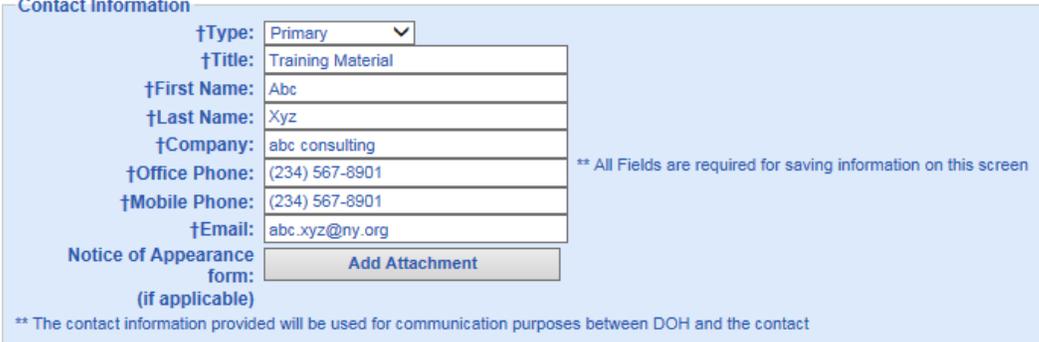
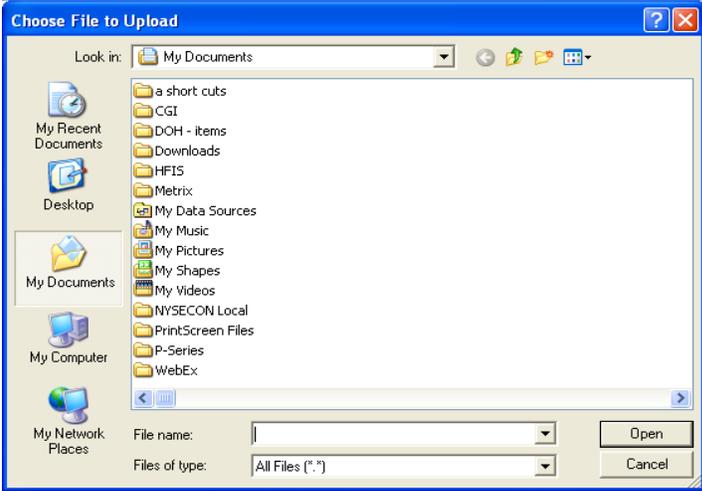
9 If a **Notice of Appearance** is to be provided for a contact refer to *Attach notice of Appearance [NOA]* for contact section 2.1 below

10 Click **Save**.
 The **General information** page is displayed. The new contact information will be displayed in the contact table.

Name	Title	Company	Office Phone	Mobile Phone	Email	NOA
Art Fowler - Primary	Project Manager	DOH	(518) 222-8888	(518) 000-0000	art.fowler@its.ny.gov	
Denise Shuler	Project Controller	DOH	(518) 222-5555	(518) 333-0000	denise.shuler@doh.ny.gov	
Payal Sareen	Project Analyst	DOH	(518) 402-7828	(518) 381-4585	payal.sareen@its.ny.gov	

Figure 7 Contacts have been added

Attach Notice of Appearance (NOA) for contacts

Learning Objective	Step	Action
Attach NOA for a contact	1	<p>On the New Contact Information page, click Add Attachment</p>  <p><i>Figure 8: Add NOA Attachment</i></p>
	2	<p>On the Add NOA Attachments page, select Browse</p>  <p><i>Figure 9: Add NOA Attachment</i></p>
	3	<p>Choose the attachment from the local workstation. Click Open</p>  <p><i>Figure 10: Browse for document</i></p>

4 Click **Add Attachment**



Figure 11: Attachment path is reflected in the File

5 The **New Contact Information** screen is displayed
Note: The attachment has been added and the **Add Attachment** button changes to **Delete** button.

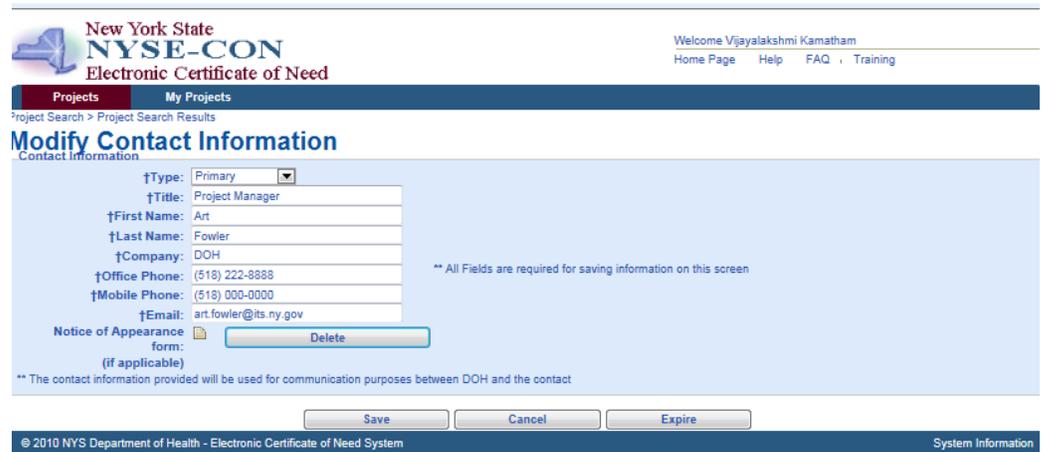


Figure 12: Attachment Added and 'Delete' button visible.

Modify contact information

Learning Objective	Step	Action																												
How to Modify a Contact	1	<p>On the General Information page, click the Name link of the contact to be modified.</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Title</th> <th>Company</th> <th>Office Phone</th> <th>Mobile Phone</th> <th>Email</th> <th>NOA</th> </tr> </thead> <tbody> <tr> <td>Art Fowler - Primary</td> <td>Project Manager</td> <td>DOH</td> <td>(518) 222-8888</td> <td>(518) 000-0000</td> <td>art.fowler@its.ny.gov</td> <td></td> </tr> <tr> <td>Denise Shuler</td> <td>Project Controller</td> <td>DOH</td> <td>(518) 222-5555</td> <td>(518) 333-0000</td> <td>denise.shuler@doh.ny.gov</td> <td></td> </tr> <tr> <td>Payal Sareen</td> <td>Project Analyst</td> <td>DOH</td> <td>(518) 402-7828</td> <td>(518) 391-4585</td> <td>payal.sareen@its.ny.gov</td> <td></td> </tr> </tbody> </table> <p style="text-align: center;">Add Contact</p>	Name	Title	Company	Office Phone	Mobile Phone	Email	NOA	Art Fowler - Primary	Project Manager	DOH	(518) 222-8888	(518) 000-0000	art.fowler@its.ny.gov		Denise Shuler	Project Controller	DOH	(518) 222-5555	(518) 333-0000	denise.shuler@doh.ny.gov		Payal Sareen	Project Analyst	DOH	(518) 402-7828	(518) 391-4585	payal.sareen@its.ny.gov	
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Payal Sareen	Project Analyst	DOH	(518) 402-7828	(518) 391-4585	payal.sareen@its.ny.gov																									

Figure 13: Name link in contact table on General Information page

- 2** The **Modify Contact Information** page will display.
The information previously entered is enabled for modifying.

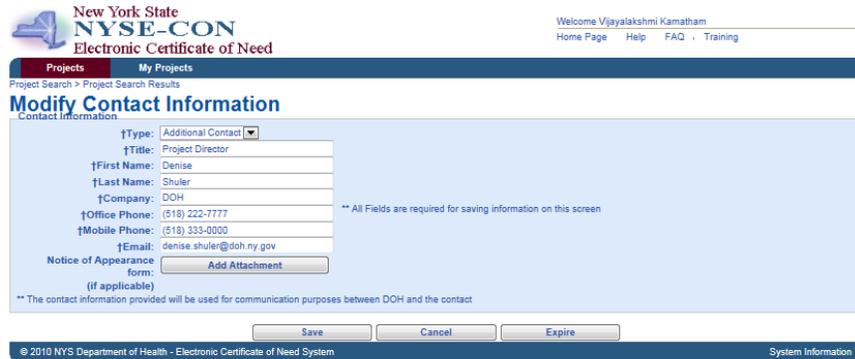


Figure 14: Modify Contact Information

- 3** Enter information in the textboxes that require modification.
- 4** The **Delete** or **Backspace** buttons may be used to clear the previously entered information
- 5** Enter the new information
- 6** Click **Save** button on the screen. “General information” is now displayed with updates to the Contact Table.

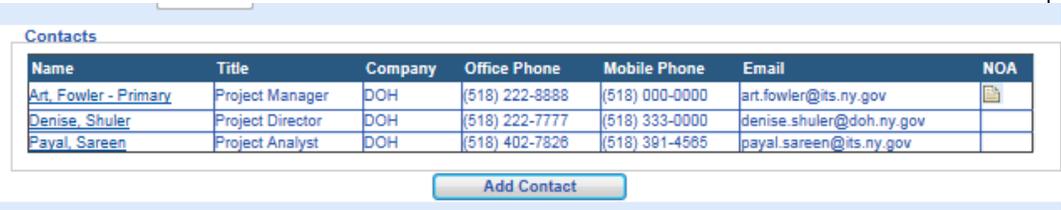


Figure 15: Modified Contact Information

Change Primary contact

Learning Objective	Step	Action
How to Change the Primary Contact	1	<p>On the General Information page, click the Name link of the contact, to be assigned as Primary.</p> <p>Figure 16: Name link in contact table on General Information page</p>

2 Select **Primary** from the contact **Type** drop down list

New York State
NYSE-CON
Electronic Certificate of Need

Welcome Vijayalakshmi Kamatham
Home Page Help FAQ Training

Projects My Projects

Project Search > Project Search Results

Modify Contact Information

Contact Information

↑Type: Primary
 ↑Title: Please Choose
 ↑First Name: Primary
 ↑Last Name: Shuler
 ↑Company: DOH
 ↑Office Phone: (518) 222-7777
 ↑Mobile Phone: (518) 333-0000
 ↑Email: denise.shuler@doh.ny.gov

Notice of Appearance form: Add Attachment

** All Fields are required for saving information on this screen

** The contact information provided will be used for communication purposes between DOH and the contact

Save Cancel Expire

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Figure 17: Select Primary in 'Type'

3 Click **Save**

Name	Title	Company	Office Phone	Mobile Phone	Email	NOA
Denise Shuler - Primary	Project Director	DOH	(518) 222-7777	(518) 333-0000	denise.shuler@doh.ny.gov	
Art Fowler	Project Manager	DOH	(518) 222-8888	(518) 000-0000	art.fowler@its.ny.gov	
Payal Sareen	Project Analyst	DOH	(518) 402-7826	(518) 391-4565	payal.sareen@its.ny.gov	

Add Contact

Figure 18: Type Changed: Changes reflected in contact table

*Note: The Contact previously set to Primary will be assigned 'Additional' by the system.
Contact which has the 'Type' set to 'Primary' cannot be changed to 'Additional' unless another contact has been designated as "Primary" using the process above.*

Expire a Contact

Learning Objective	Step	Action																												
How to Expire a Contact	1	<p>On the General Information page, click the Name link for the contact to expire. Modify Contact Information screen is displayed.</p> <p>Contacts</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Title</th> <th>Company</th> <th>Office Phone</th> <th>Mobile Phone</th> <th>Email</th> <th>NOA</th> </tr> </thead> <tbody> <tr> <td>Denise Shuler - Primary</td> <td>Project Director</td> <td>DOH</td> <td>(518) 222-7777</td> <td>(518) 333-0000</td> <td>denise.shuler@doh.ny.gov</td> <td></td> </tr> <tr> <td>Art Fowler</td> <td>Project Manager</td> <td>DOH</td> <td>(518) 222-8888</td> <td>(518) 000-0000</td> <td>art.fowler@its.ny.gov</td> <td></td> </tr> <tr> <td>Payal Sareen</td> <td>Project Analyst</td> <td>DOH</td> <td>(518) 402-7826</td> <td>(518) 391-4565</td> <td>payal.sareen@its.ny.gov</td> <td></td> </tr> </tbody> </table> <p>Add Contact</p>	Name	Title	Company	Office Phone	Mobile Phone	Email	NOA	Denise Shuler - Primary	Project Director	DOH	(518) 222-7777	(518) 333-0000	denise.shuler@doh.ny.gov		Art Fowler	Project Manager	DOH	(518) 222-8888	(518) 000-0000	art.fowler@its.ny.gov		Payal Sareen	Project Analyst	DOH	(518) 402-7826	(518) 391-4565	payal.sareen@its.ny.gov	
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Payal Sareen	Project Analyst	DOH	(518) 402-7826	(518) 391-4565	payal.sareen@its.ny.gov																									

Figure 19: 'Name hyperlink - Expire the contact

2 Click **Expire** button on the lower right

Figure 20: Contact Table- Contact Expired

3 The **General information** page will display with the contact marked as **Expired** in the **Name** field in the **Contact Table**.

Contacts

Name	Title	Company	Office Phone	Mobile Phone	Email	NOA
Denise Shuler - Primary	Project Director	DOH	(518) 222-7777	(518) 333-0000	denise.shuler@doh.ny.gov	
Art Fowler	Project Manager	DOH	(518) 222-8888	(518) 000-0000	art.fowler@its.ny.gov	
Payal Sareen - EXPIRED	Project Analyst	DOH	(518) 402-7826	(518) 391-4565	payal.sareen@its.ny.gov	

[Add Contact](#)

Figure 21: Contact Table- Contact Expired

Note: A 'Primary' contact cannot be 'Expired' until another contact has been designated as 'Primary'.

Reactivate a Contact

Learning Objective	Step	Action
How to Reactivate an Expired Contact	1	<p>On the General Information page, click the checkbox to expand the contacts table to view expired contacts. Click the expired contact Name link in the Contacts table.</p>

Figure 22: Click name marked 'Expire'

- 2** The **Reactivate Contact Information** screen gets displayed
Click the **Reactivate** button

Figure 23: Reactivate contact information screen

- 3** If any information has to be updated, follow steps in section 2.2 to modify the contact.

- 4** Click **Save**

Contacts

Name	Title	Company	Office Phone	Mobile Phone	Email	NOA
Denise_Shuler - Primary	Project Director	DOH	(518) 222-7777	(518) 333-0000	denise.shuler@doh.ny.gov	
Art_Fowler	Project Manager	DOH	(518) 222-8888	(518) 000-0000	art.fowler@its.ny.gov	
Payal_Sareen	Project Analyst	DOH	(518) 402-7826	(518) 391-4565	payal.sareen@its.ny.gov	

[Add Contact](#)

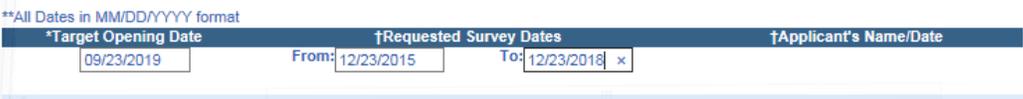
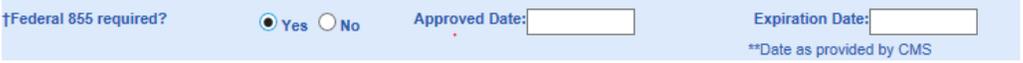
Figure 24: Reactivated contact: Expire marking removed

Note:

In the contact table, the 'Expired' marking against the name of the contact will get removed and the Contact Table will show the updated information

Submit a Request to Regional Office

Learning Objective	Step	Action
How to Submit a Request to the Regional Office	1	On the General Information Page, Refer figure 1- perform the Steps mentioned in section 1 to Create a Phase
	2	Follow the steps in section 2 to Add Contacts To attach NOA for a contact, refer section 2.1

	<p>3 Enter a date range to be considered for the survey with dates prior to the target open date. The system accepts dates in MMDDYYYY, MM/DD/YYYY or MM/DD/YY formats. Enter date in the From textbox. Enter date in the To textbox.</p>  <p style="text-align: center;"><i>Figure 25: Requested Survey Dates</i></p>
	<p>4 Select if the Federal 855 is required for the project (Radio button: Yes / No).</p>  <p style="text-align: center;"><i>Figure 26: Federal 855 Information</i></p>
	<p>5 Enter the Approval Date for Federal 855, if Yes is selected and date is known <i>*This is not a mandatory field</i></p>
	<p>6 Enter the Expiration Date for Federal 855 as provided by CMS, if Yes is selected and date is known <i>*This is not a mandatory field, yet if the Approval date has been provided the submission will not be accepted without the expiration date.</i></p>

7

Click **Submit**.

The screenshot shows the 'Regional Office' page in the NYSE-CON system. At the top, there are tabs for 'Projects' and 'My Projects'. Below that is a breadcrumb 'Project Search > Project Search Results'. The main heading is 'Regional Office' with sub-tabs: 'General', 'Executive Summary', 'Application', 'Correspondence', 'Decision', 'Contingencies', 'Post Approval', 'Regional Office', and 'Summary'. The 'Regional Office' tab is active. Application details are listed: Application Number: 141059, Facility Name: Adirondack Medical Center-Lake Placid Site, Project Description: Decertify two (2) medical/surgical beds resulting in a provider based off-campus emergency department to operate on a part-time basis. The 'General Information' section is expanded, showing 'Phase 1a' selected. Below this is a 'Contacts' section with a table listing 'John Smith - Primary' as Project Manager at abc consultants. A 'Survey' section is also visible with a table listing 'Environmental', 'Clinical', and 'Administrative' types. At the bottom of the page, there are 'Add Phase' and 'Modify' buttons. A footer contains the copyright notice: © 2010 NYS Department of Health - Electronic Certificate of Need System.

Figure 27: Screen after submission

Modify the general information after submitting the request to RO.

Modify Target opening date

Learning Objective	Step	Action
To modify the target	1	After the request for review has been submitted, the Modify button is displayed on the General Information page (Refer to figure 27).

opening date
on the
general
information
page

2

Click **Modify**

Projects My Projects

Project Search > Project Search Results

Regional Office

General Executive Summary Application Correspondence Decision Contingencies Post Approval **Regional Office** Summary

Application Number: 141059
Facility Name: Adirondack Medical Center-Lake Placid Site
Project Description: Decertify two (2) medical/surgical beds resulting in a provider based off-campus emergency department to operate on a part-time basis

General Information

Phase 1a

General Information Correspondence

*Phase ID: 1a
*Phase Description: Creating a project for training purposes
Federal Tax ID #: 123456789 (If Applicable)

Contacts

View All Contacts

Name	Title	Company	Office Phone	Mobile Phone	Email	NOA
John Smith - Primary	Project Manager	abc consultants	(234) 576-8901	(123) 456-7890	j.smith@abc.com	

Add Contact

**All Dates in MM/DD/YYYY format

*Target Opening Date	†Requested Survey Dates	‡Applicant's Name/Date
02/15/2019	From: 02/15/2016 To: 03/15/2018	Role Econ 07/29/2015

†Federal 855 required? Yes No Approved Date: Expiration Date:
**Date as provided by CMS

Survey

Type	Required	Scheduled Date	Confirm Date	Reviewer
Environmental				
Clinical				
Administrative				

Save Cancel

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Figure 28: Screen to Modify

3

Enter the new **Target opening date** in the Target Opening Date textbox.

**All Dates in MM/DD/YYYY format

*Target Opening Date	†Requested Survey Dates	‡Applicant's Name/Date
02/15/2019 x	From: 02/15/2016 To: 03/15/2018	Role Econ 07/29/2015

Figure 29: Select cell to modify Target opening date

4

Click **Save**

**All Dates in MM/DD/YYYY format

*Target Opening Date	†Requested Survey Dates	‡Applicant's Name/Date
▼ 09/23/2018	From: 02/15/2016 To: 03/15/2018	Role Econ 07/30/2015
02/15/2019	From: 02/15/2016 To: 03/15/2018	Role Econ 07/29/2015

Figure 30: Save new date

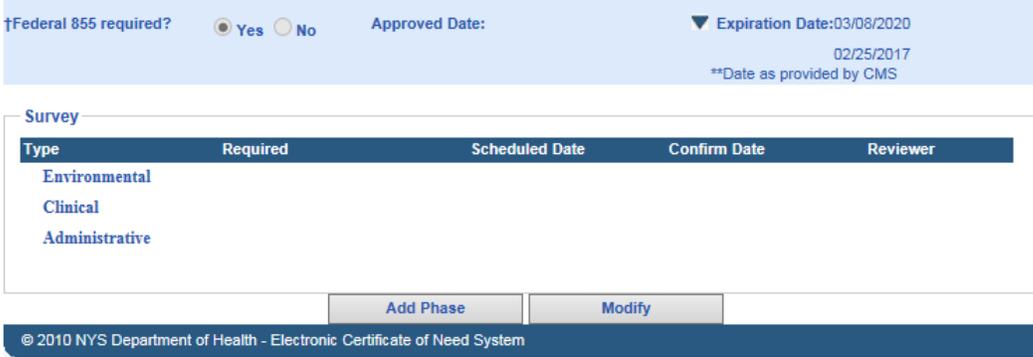
On saving, the toggle appears next to the row. Clicking the toggle will show previous survey and confirmation dates.

Modify Requested Survey Date range

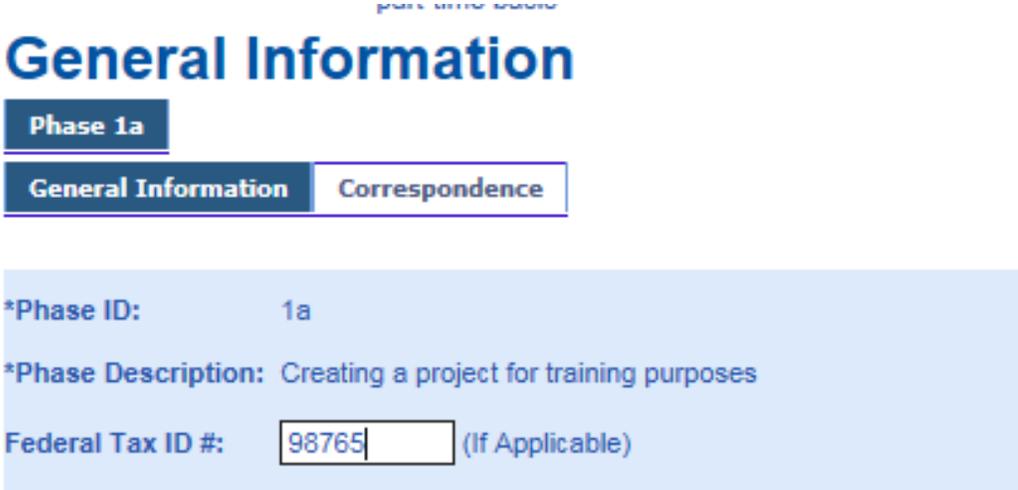
Learning Objective	Step	Action															
To modify the requested survey date range on the general information page	1	Click Modify on the General information page <i>Refer figure 27,28</i>															
	2	Enter the new date in the Requested Survey Date To: textbox. <div style="border: 1px solid #ccc; padding: 5px;"> <p><small>**All Dates in MM/DD/YYYY format</small></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">*Target Opening Date</th> <th style="width: 25%;">†Requested Survey Dates</th> <th style="width: 25%;">†Applicant's Name/Date</th> <th style="width: 25%;"></th> </tr> </thead> <tbody> <tr> <td>09/23/2018</td> <td>From: 02/15/2016 ✖</td> <td>To: 03/15/2018</td> <td>Role Econ 07/30/2015</td> </tr> </tbody> </table> <p>†Federal 855 required? <input checked="" type="radio"/> Yes <input type="radio"/> No Approved Date: Expiration Date: <input type="text"/></p> </div> <p style="text-align: center;"><i>Figure 31: Select cell to modify survey date range</i></p>	*Target Opening Date	†Requested Survey Dates	†Applicant's Name/Date		09/23/2018	From: 02/15/2016 ✖	To: 03/15/2018	Role Econ 07/30/2015							
	*Target Opening Date	†Requested Survey Dates	†Applicant's Name/Date														
	09/23/2018	From: 02/15/2016 ✖	To: 03/15/2018	Role Econ 07/30/2015													
3	Enter the new date in the Requested Survey Date From: textbox. <div style="border: 1px solid #ccc; padding: 5px;"> <p><small>**All Dates in MM/DD/YYYY format</small></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">*Target Opening Date</th> <th style="width: 25%;">†Requested Survey Dates</th> <th style="width: 25%;">†Applicant's Name/Date</th> <th style="width: 25%;"></th> </tr> </thead> <tbody> <tr> <td>09/23/2018</td> <td>From: <input style="width: 100px;" type="text"/></td> <td>To: 03/15/2018</td> <td>Role Econ 07/30/2015</td> </tr> </tbody> </table> </div> <p style="text-align: center;"><i>Figure 32: Clear cell to enter new data</i></p>	*Target Opening Date	†Requested Survey Dates	†Applicant's Name/Date		09/23/2018	From: <input style="width: 100px;" type="text"/>	To: 03/15/2018	Role Econ 07/30/2015								
*Target Opening Date	†Requested Survey Dates	†Applicant's Name/Date															
09/23/2018	From: <input style="width: 100px;" type="text"/>	To: 03/15/2018	Role Econ 07/30/2015														
4	Click Save . * On saving the toggle appears next to the row. Clicking the toggle expands to show the history of date changes. <div style="border: 1px solid #ccc; padding: 5px;"> <p><small>**All Dates in MM/DD/YYYY format</small></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">*Target Opening Date</th> <th style="width: 25%;">†Requested Survey Dates</th> <th style="width: 25%;">†Applicant's Name/Date</th> <th style="width: 25%;"></th> </tr> </thead> <tbody> <tr> <td>09/23/2018</td> <td>From: 03/23/2016</td> <td>To: 03/23/2018</td> <td>Role Econ 07/30/2015</td> </tr> <tr> <td>02/15/2019</td> <td>From: 02/15/2016</td> <td>To: 03/15/2018</td> <td>Role Econ 07/29/2015</td> </tr> <tr> <td>09/23/2018</td> <td>From: 02/15/2016</td> <td>To: 03/15/2018</td> <td>Role Econ 07/30/2015</td> </tr> </tbody> </table> </div> <p style="text-align: center;"><i>Figure 33: Save new survey dates</i></p>	*Target Opening Date	†Requested Survey Dates	†Applicant's Name/Date		09/23/2018	From: 03/23/2016	To: 03/23/2018	Role Econ 07/30/2015	02/15/2019	From: 02/15/2016	To: 03/15/2018	Role Econ 07/29/2015	09/23/2018	From: 02/15/2016	To: 03/15/2018	Role Econ 07/30/2015
*Target Opening Date	†Requested Survey Dates	†Applicant's Name/Date															
09/23/2018	From: 03/23/2016	To: 03/23/2018	Role Econ 07/30/2015														
02/15/2019	From: 02/15/2016	To: 03/15/2018	Role Econ 07/29/2015														
09/23/2018	From: 02/15/2016	To: 03/15/2018	Role Econ 07/30/2015														

Modify Federal 855 expiration date

Learning Objective	Step	Action
To modify the Federal 855 Expiration date on the general information page	1	Click Modify on the General Information Page <i>Refer figure 27,28</i>
	2	Enter the new date in the Expiration Date textbox. <div style="border: 1px solid #ccc; padding: 5px;"> <p>†Federal 855 required? <input checked="" type="radio"/> Yes <input type="radio"/> No Approved Date: Expiration Date: 02/25/2017 ✖</p> <p style="text-align: right;"><small>**Date as provided by CMS</small></p> </div> <p style="text-align: center;"><i>Figure 34: On clicking Modify Fed 855 expiration date allows editing</i></p>

3	<p>Click Save.</p> <p>* <i>On saving the toggle appears next to the row. Clicking the toggle expands to show the history of date changes.</i></p>  <p style="text-align: center;"><i>Figure 35: Date as entered saved. History accessible by toggle.</i></p>
----------	---

Modify Federal Tax ID

Learning Objective	Step	Action
To modify the Federal Tax ID# on the general information page	1	Refer fig 27, 28. Click Modify .
	2	<p>Enter the new or modified Federal Tax ID number in the Federal Tax ID # textbox.</p>  <p style="text-align: center;"><i>Figure 36: Clearing the earlier entry</i></p>

Click **Save**

General Information

Phase 1a

General Information

Correspondence

*Phase ID: 1a

*Phase Description: Creating a project for training purposes

Federal Tax ID #: 123456789

Figure 37: Federal Tax ID # as modified

Note:

The system does not record the history of changes for this field.

Add, Cancel, Delete a new phase

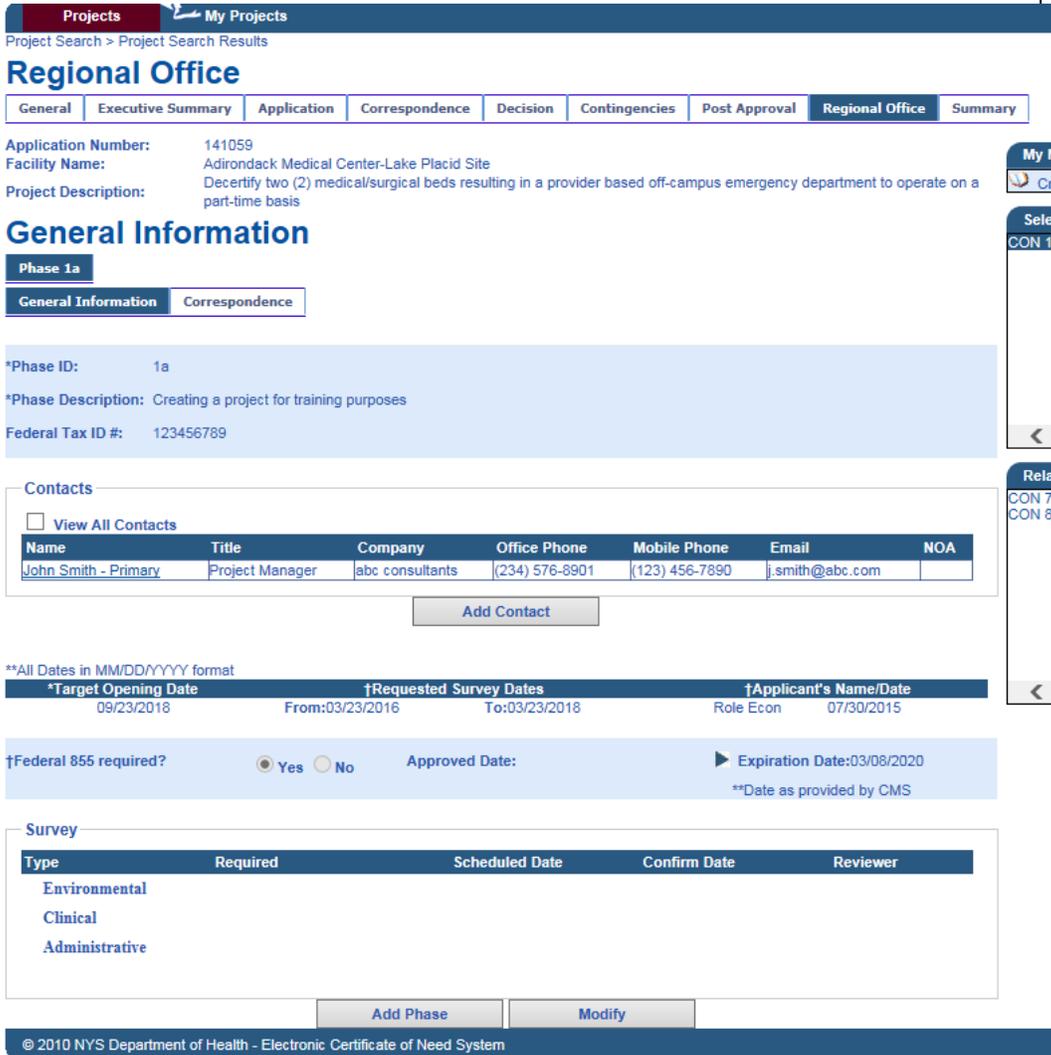
<p>Add new phase</p>	<p>1</p>	<p>Once a phase has been saved, another phase can be created. To create another phase: Click Add Phase.</p> <p>* Note: Add Phase button shows up on the first Phase, General Information page only.</p>  <p>The screenshot displays the 'Regional Office' section of the NYSE-CON system. It includes a navigation bar with 'Projects' and 'My Projects' tabs. Below this, there are tabs for 'General', 'Executive Summary', 'Application', 'Correspondence', 'Decision', 'Contingencies', 'Post Approval', 'Regional Office', and 'Summary'. The 'Regional Office' tab is selected, showing project details for 'Application Number: 141059' and 'Facility Name: Adirondack Medical Center-Lake Placid Site'. The 'General Information' section is expanded, showing 'Phase 1a' with a description: 'Creating a project for training purposes'. A 'Contacts' table lists 'John Smith - Primary' as the Project Manager. At the bottom of the interface, there are buttons for 'Add Contact', 'Add Phase', and 'Modify'.</p>
-----------------------------	----------	---

Figure 38: Adding new phase

2

Enter or modify the phase ID if changing from default.

Enter the Phase description (required).

*Note: The following information remains constant for all phases of a project:

Phase ID: Can be altered as per the specific phase numbering conventions followed by the application, but defaults to the next sequential number

Federal Tax ID #- Any change made to this number will be reflected across phases.

Contacts: Any changes made on the contacts table will be reflected in the earlier created phase(s).

Federal 855 information- This can be changed. The entry in the earlier phase(s) will also get updated.

Projects My Projects

Project Search > Project Search Results

Regional Office

General Executive Summary Application Correspondence Decision Contingencies Post Approval **Regional Office** Summary

Application Number: 141059
 Facility Name: Adirondack Medical Center-Lake Placid Site
 Project Description: Decertify two (2) medical/surgical beds resulting in a provider based off-campus emergency department to operate on a part-time basis

General Information

Phase 1a **Phase 2**

General Information Correspondence

*Phase ID: 2 (e.g: 1a, 1(a),1(i) ,2b)
 *Phase Description:
 Federal Tax ID #: 123456789 (If Applicable)

Contacts

View All Contacts

Name	Title	Company	Office Phone	Mobile Phone	Email	NOA
John Smith - Primary	Project Manager	abc consultants	(234) 576-8901	(123) 456-7890	j.smith@abc.com	

Add Contact

**All Dates in MM/DD/YYYY format

*Target Opening Date From: To: †Requested Survey Dates †Applicant's Name/Date

†Federal 855 required? Yes No Approved Date: Expiration Date: 03/08/2020
 **Date as provided by CMS

Survey

Type	Required	Scheduled Date	Confirm Date	Reviewer
Environmental				
Clinical				
Administrative				

Cancel Save Clear Submit

* Fields marked with an asterisk (*) are required for saving information from this screen.

Figure 39: New phase –General Information screen

3

Click **Save**.

To Cancel the creation of phase, click **Cancel**

*Note: The creating a new phase can be cancelled only before the phase is saved.

4

To delete a phase: Click **Delete**.

*Note: The Delete button displays only after the phase has been Saved.

A phase cannot be deleted after Submission

The screenshot displays the 'General Information' section of the NYSE-CON system. At the top, there are navigation tabs: General, Executive Summary, Application, Correspondence, Decision, Contingencies, Post Approval, Regional Office, and Summary. The 'Regional Office' tab is active.

Application details include:

- Application Number: 141059
- Facility Name: Adirondack Medical Center-Lake Placid Site
- Project Description: Decertify two (2) medical/surgical beds resulting in a provider based off-campus emergency department to operate on a part-time basis

The 'General Information' section has two tabs: 'Phase 1a' and 'Phase 2'. The 'Phase 2' tab is selected. Below this, there are two sub-tabs: 'General Information' and 'Correspondence'. The 'General Information' sub-tab is active.

Form fields include:

- *Phase ID: 2 (e.g.: 1a, 1(a),1(i) ,2b)
- *Phase Description: Training to create a second phase
- Federal Tax ID #: 123456789 (If Applicable)

The 'Contacts' section has a 'View All Contacts' checkbox and a table with the following data:

Name	Title	Company	Office Phone	Mobile Phone	Email	NOA
John Smith - Primary	Project Manager	abc consultants	(234) 576-8901	(123) 456-7890	j.smith@abc.com	

 An 'Add Contact' button is located below the table.

The 'Survey' section includes:

- **All Dates in MM/DD/YYYY format
- *Target Opening Date: 02/23/2018
- †Requested Survey Dates: From: [] To: []
- †Applicant's Name/Date: Role Econ 08/03/2015
- †Federal 855 required? Yes No
- Approved Date: []
- Expiration Date: 03/08/2020
- **Date as provided by CMS

The 'Survey' table has the following data:

Type	Required	Scheduled Date	Confirm Date	Reviewer
Environmental				
Clinical				
Administrative				

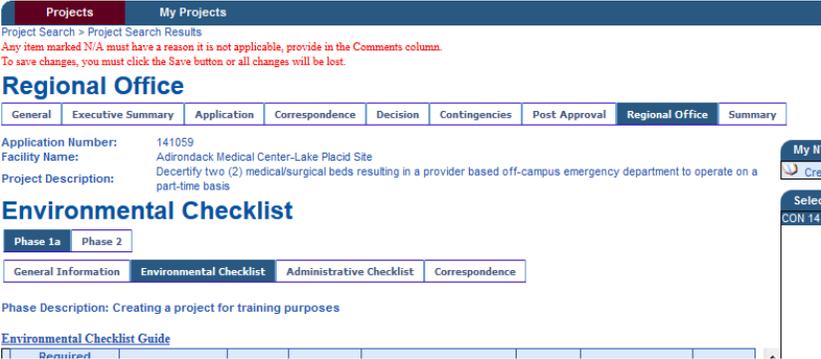
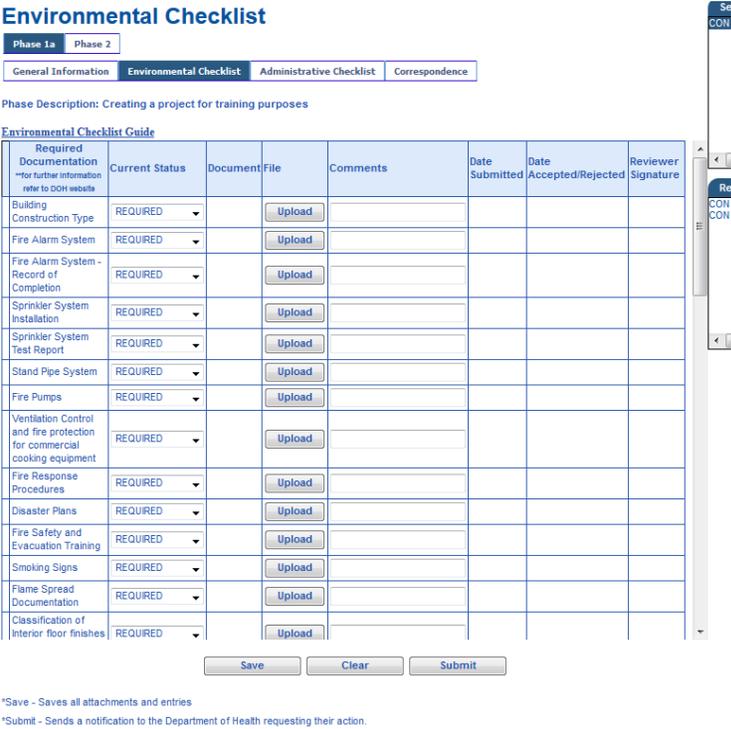
At the bottom of the form, there are four buttons: 'Delete Phase', 'Save', 'Clear', and 'Submit'. The 'Delete Phase' button is highlighted in blue.

Footnote: * Fields marked with an asterisk (*) are required for saving information from this screen. † Fields marked with a dagger (†) are required to proceed with the submission process.

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Figure 40: New phase –General Information screen- Delete Phase

Uploading, Deleting, Saving and Submitting Checklist Documents

Learning Objective	Step	Action
<p>How to upload a checklist document</p>	<p>1</p>	<p>On the Regional Office tab, select the Checklist Tab to view the list of documents needed for the survey.</p>  <p><i>Figure 41: Selecting the Environmental Checklist Tab</i></p>
	<p>2</p>	<p>On the checklist tab, the checklist items are listed in the table format.</p> <p>*Note: The hyperlink to the Environmental checklist guide is located above the table on the Environmental checklist page. Clicking the hyperlink opens the description of the checklist items (It is available only for the environmental checklist)</p>  <p><i>Figure 42: Environmental checklist table on the Environmental checklist page</i></p>

3 Click the Upload Button in the row of the checklist item to be uploaded.

Application Number: 141059
Facility Name: Adirondack Medical Center-Lake Placid Site
Project Description: Decertify two (2) medical/surgical beds resulting in a provider based off-campus emergency department to operate on a part-time basis

Environmental Checklist

Phase 1a Phase 2

General Information Environmental Checklist Administrative Checklist Correspondence

Phase Description: Creating a project for training purposes

Environmental Checklist Guide

Required Documentation <small>*for further information refer to DOH website</small>	Current Status	Document File	Comments	Date Submitted	Date Accepted/Rejected	Reviewer Signature
Building Construction Type	REQUIRED	Upload				
Fire Alarm System	REQUIRED	Upload				
Fire Alarm System - Record of Completion	REQUIRED	Upload				
Sprinkler System Installation	REQUIRED	Upload				
Sprinkler System Test Report	REQUIRED	Upload				

Figure 43: Uploading document for building construction type.

4 Add Checklist Attachment page displays. Click **Browse**.

Projects My Projects

Project Search > Project Search Results

Add Checklist Attachment

File: No file selected.

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Figure 44: Add Checklist Attachment.

5 The File upload browser displays. Select the file to be uploaded and click **Open**

File Upload

Libraries

Organize

File name: The Happy machine.jpg All Files (*.*)

Figure 45: Add Checklist Attachment.

6 Click **Add Attachment**

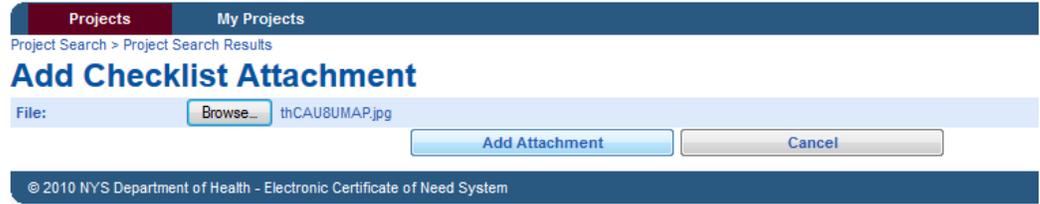


Figure 46: Add Attachment.

7 The added **attachment** is indicated by the document icon on the table.
 *Note: The upload button changes to a **Delete** button to accommodate correction.

Environmental Checklist Guide

Required Documentation <small>→for further information refer to DOH website</small>	Current Status	Document	File	Comments	Date Submitted	Date Accepted/Rejected	Reviewer Signature
Building Construction Type	REQUIRED	thCAU8UMAP.jpg	Delete				
Fire Alarm System	REQUIRED		Upload				

Figure 47: Document uploaded can be deleted before saving

8 To add any comments about the uploaded document, enter comment in the **Comments** textbox in the corresponding row (Optional).

9 Click **Save** to save all work when complete.

*Note: Documents do not need to be saved one at a time. More than one checklist document may be added before saving.

Environmental Checklist

Phase 1a Phase 2
 General Information **Environmental Checklist** Administrative Checklist Correspondence

Phase Description: Creating a project for training purposes

Environmental Checklist Guide

Required Documentation <small>**for further information refer to DOH website</small>	Current Status	Document	File	Comments	Date Submitted	Date Accepted/Rejected	Reviewer Signature
Building Construction Type	REQUIRED	thCAUSUMAP.jpg	Delete				
Fire Alarm System	REQUIRED		Upload				
Fire Alarm System - Record of Completion	REQUIRED		Upload				
Sprinkler System Installation	REQUIRED		Upload				
Sprinkler System Test Report	REQUIRED		Upload				
Stand Pipe System	REQUIRED		Upload				
Fire Pumps	REQUIRED		Upload				
Ventilation Control and fire protection for commercial cooking equipment	REQUIRED		Upload				
Fire Response Procedures	REQUIRED		Upload				
Disaster Plans	REQUIRED		Upload				
Fire Safety and Evacuation Training	REQUIRED		Upload				

Save Clear Submit

Figure 48: Saving the Uploaded document

10 Repeat the steps listed above to upload any more documents for the checklist.

*Note: If a single checklist item requires multiple files or documents, a toggle will appear next to the checklist item. Clicking the toggle will expand to show multiple documents.

Environmental Checklist Guide

Required Documentation <small>**for further information refer to DOH website</small>	Current Status	Document	File	Comments	Date Submitted	Date Accepted/Rejected	Reviewer Signature
▶ Building Construction Type	REQUIRED		Upload				
Fire Alarm System	REQUIRED		Upload				

Figure 49: Toggle appearing by the checklist item

11 To submit the uploaded documents: Click **Submit**.
The submission confirmation screen displays. Click **Confirm**.

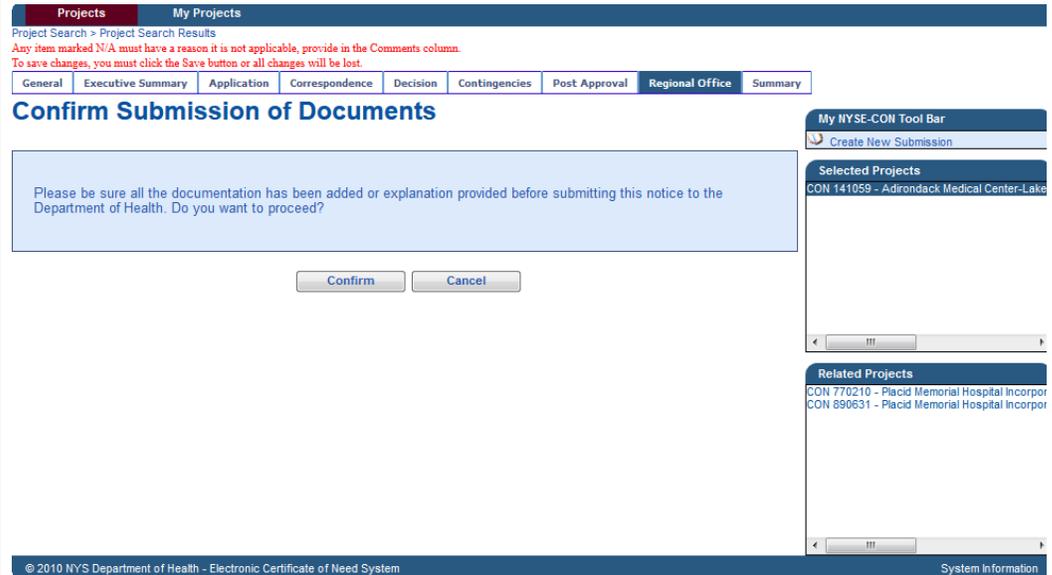


Figure 50: Submission confirmation

Changing status of a checklist item to N/A

Learning Objective	Step	Action																																
How to change the Status of the Checklist item from Required to N/A	1	<p>On the checklist table, in the status column, the default status for all documents is set as Required. Select N/A for the status selection list.</p> <p><u>Environmental Checklist Guide</u></p> <table border="1"> <thead> <tr> <th>Required Documentation <small>*for further information refer to DOH website</small></th> <th>Current Status</th> <th>Document</th> <th>File</th> <th>Comments</th> <th>Date Submitted</th> <th>Date Accepted/Rejected</th> <th>Reviewer Signature</th> </tr> </thead> <tbody> <tr> <td>Building Construction Type</td> <td>REQUIRED</td> <td></td> <td>Upload</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Fire Alarm System</td> <td>REQUIRED</td> <td></td> <td>Upload</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Fire Alarm System - Record of Completion</td> <td>Please Choose REQUIRED N/A</td> <td></td> <td>Upload</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Required Documentation <small>*for further information refer to DOH website</small>	Current Status	Document	File	Comments	Date Submitted	Date Accepted/Rejected	Reviewer Signature	Building Construction Type	REQUIRED		Upload					Fire Alarm System	REQUIRED		Upload					Fire Alarm System - Record of Completion	Please Choose REQUIRED N/A		Upload				
Required Documentation <small>*for further information refer to DOH website</small>	Current Status	Document	File	Comments	Date Submitted	Date Accepted/Rejected	Reviewer Signature																											
Building Construction Type	REQUIRED		Upload																															
Fire Alarm System	REQUIRED		Upload																															
Fire Alarm System - Record of Completion	Please Choose REQUIRED N/A		Upload																															

Figure 51: Drop down list of Status_ Selecting N/A

2 Provide the reason the checklist item is not applicable to the project phase in the **Comments** column.

*Note: Providing a comment is required if the status is set to N/A, to submit the checklist.

Environmental Checklist Guide

Required Documentation <small>*for further information refer to DOH website</small>	Current Status	Document	File	Comments	Date Submitted	Date Accepted/Rejected	Reviewer Signature
Building Construction Type	REQUIRED		Upload				
Fire Alarm System	N/A		Upload	The phase is not touching th			
Fire Alarm System - Record of Completion	REQUIRED		Upload				
Sprinkler System Installation	REQUIRED		Upload				
Sprinkler System Test Report	REQUIRED		Upload				
Stand Pipe System	REQUIRED		Upload				
Fire Pumps	REQUIRED		Upload				
Ventilation Control and fire protection for commercial cooking equipment	REQUIRED		Upload				
Fire Response Procedures	REQUIRED		Upload				
Disaster Plans	REQUIRED		Upload				
Fire Safety and Evacuation Training	REQUIRED		Upload				
Smoking Signs	REQUIRED		Upload				
Flame Spread Documentation	REQUIRED		Upload				

Save Clear Submit

Figure 52: Providing comments for N/A

3 Click **Save** to save the information provided or **Submit** if the available and required information has been provided.

Notification for Schedule Survey correspondence

When the Reviewer schedules a survey for a regional office review, the following email notification is received. Select the link within the email notification to enter NYSE-CON and be directed to the Correspondence tab on the **Regional Office Tab**. If you are not logged into the system you will be redirected to the Login page. After you log in please select this link again to continue to the regional office information.

Email Notification Sent

1 Regional office Applicants

From: NYS Department of Health [mailto:nysecon@health.state.ny.us]
Sent: Wednesday, February 11, 2015 2:20 PM
To: Kamatham, Vijayalakshmi (ITS)
Subject: Applicant Contact Anilkumar Local Elizabethtown Community Hospital , Facility ID 303

Notification Date: 02/11/2015

NYS Department of Health, NYSE-CON notification: There is a new Application CON # 141276, Elizabethtown Community Hospital, Facility ID 303 from Anilkumar Local has initiated the Regional Office review. Please log into the NYSE-CON system to see the new information.

For your convenience you may use the following link to the Regional Office tab:

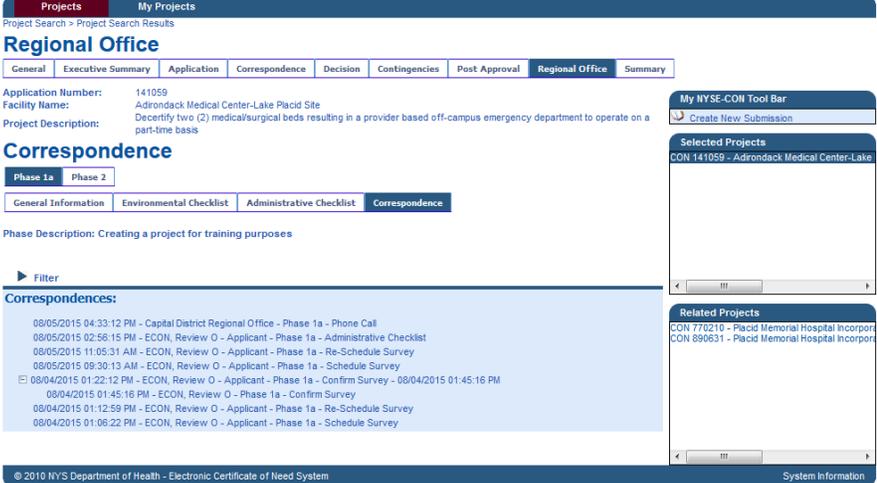
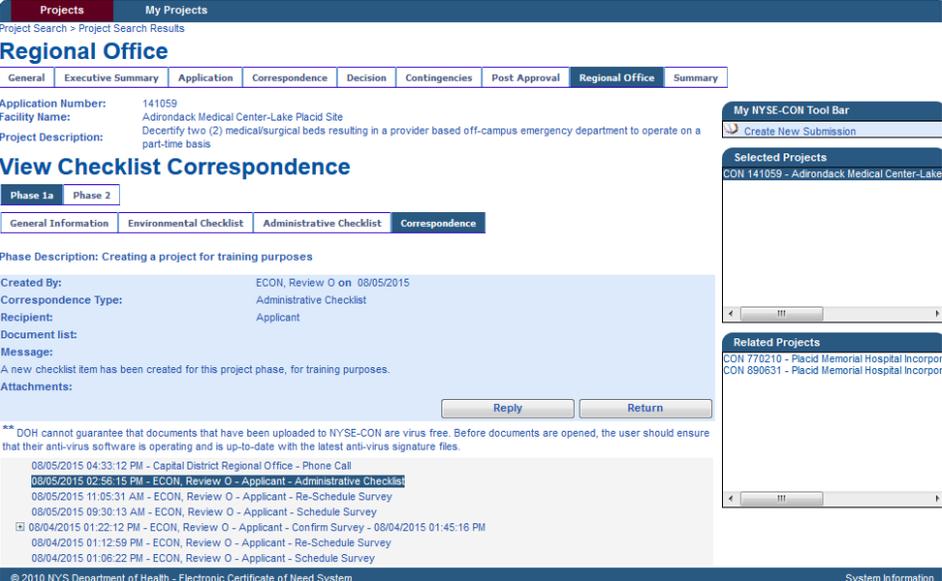
If you are using NYSE-CON via the Health Commerce System (HCS) use this link

<https://commerce.health.state.ny.us/doh2/applinks/nysecon/viewRegionalOffice?Id=24760>

If you are not logged into the NYSE-CON system you will be redirected to the Login page. After you login please select this link again to continue to the Regional Office.

Figure 53: Sample Notification Email for Schedule Survey correspondence

View Correspondence (survey correspondence, general correspondence, checklist correspondence and phone logs)

Learning Objective	Step	Action
<p>How to view a correspondence</p>	<p>1</p>	<p>Select the 'Regional Office' tab. Select the Correspondence tab.</p>  <p style="text-align: center;"><i>Figure 54: Correspondence Screen</i></p>
	<p>2</p>	<p>The screen contains the hyperlinks to the correspondence created in chronological order of occurrence. Click on the hyperlink to access the content of the correspondence.</p>
	<p>3</p>	<p>The 'View Survey Correspondence' is now displayed.</p>  <p style="text-align: center;"><i>Figure 54: View Survey Correspondence Screen</i></p>

Reply to Correspondence (Applies to survey correspondence, checklist correspondence, general correspondence)

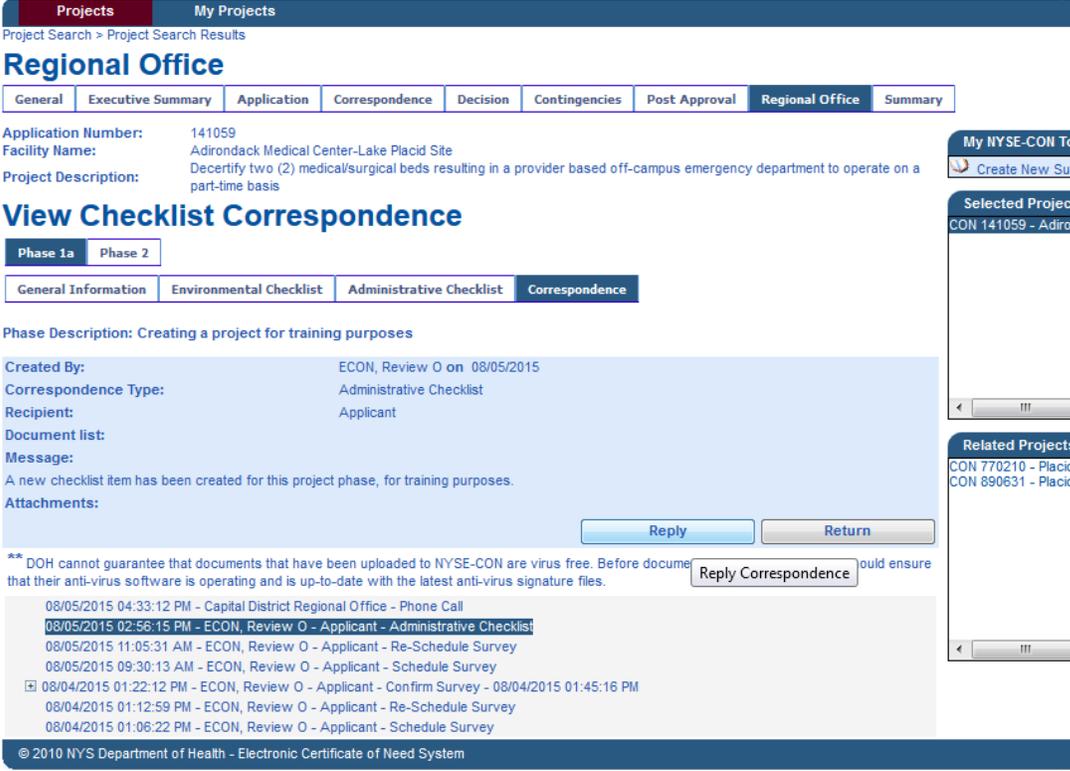
Learning Objective	Step	Action
How to reply to correspondence	1	<p>On the View Correspondence page, click Reply</p>  <p>The screenshot shows the 'View Checklist Correspondence' page for project 141059. It includes tabs for 'General Information', 'Environmental Checklist', 'Administrative Checklist', and 'Correspondence'. The 'Correspondence' tab is active, showing a 'Phase Description' and a list of attachments. A 'Reply' button is visible at the bottom right of the correspondence details section.</p>

Figure 55: Reply Button on View correspondence screen

2

Enter the **message** in the text area provided.

Regional Office

General Executive Summary Application Correspondence Decision Contingencies Post Approval **Regional Office**

Application Number: 141059
 Facility Name: Adirondack Medical Center-Lake Placid Site
 Project Description: Decertify two (2) medical/surgical beds resulting in a provider based off-campus emergency department to operate part-time basis

Reply to Checklist Correspondence

Phase 1a Phase 2

General Information Environmental Checklist Administrative Checklist **Correspondence**

Phase Description: Creating a project for training purposes

Created By: Role Econ on 08/06/2015
 Correspondence Type: Administrative Checklist
 Recipient: ECON, Review O
 Document list:
 †Message:

[Style] [Font] [Size]

B *I* U [List Icons] [Link Icon] [Image Icon]

Attachments:

Add Attachment Send Reply Cancel

In Response To

Created By: ECON, Review O on 08/05/2015
 Correspondence Type: Administrative Checklist
 Document list:
 Message:

A new checklist item has been created for this project phase, for training purposes.

Attachments:

** DOH cannot guarantee that documents that have been uploaded to NYSE-CON are virus free. Before documents are opened, the user should that their anti-virus software is operating and is up-to-date with the latest anti-virus signature files.

Figure 56: Reply Correspondence screen

3

To add an attachment, click **Add Attachment**

4 The 'Add Survey Correspondence Attachment' screen is displayed.

Figure 57: Add Survey Correspondence Attachment Screen

5 Select **Document Type** for the attachment using the drop down list or type the description in the text field provided below the list box.

Figure 58: Drop down list for description

6 Click **Browse**. The windows browser opens for selecting the file to be attached.

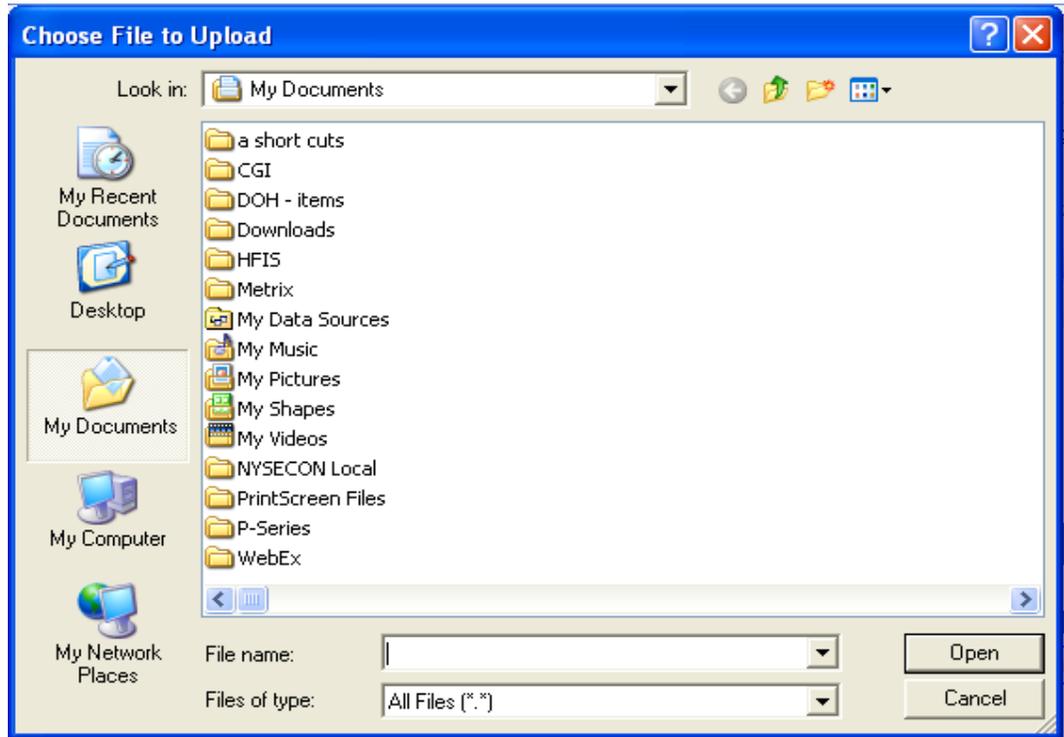


Figure 59: Windows browser to find attachment on the computer.

7 Select the file and click **Open**

8 Click **Add Attachment**



Figure 60: Windows browser to find attachment on the computer.

9

Click **Send Reply**

Reply to Checklist Correspondence

Phase 1a Phase 2

General Information Environmental Checklist Administrative Checklist **Correspondence**

Phase Description: Creating a project for training purposes

Created By: Role Econ on 08/06/2015
Correspondence Type: Administrative Checklist
Recipient: ECON, Review O
Document list:
↑Message:

[Style] [Font] [Size]
B *I* U [List] [Align] [Indent] [Link] [Image] [Table]

Reply to the correspondence created for training purposes

Attachments:

thCAU8UMAP.jpg

Add Attachment

Send Reply

Cancel

In Response To

Created By: ECON, Review O on 08/05/2015
Correspondence Type: Administrative Checklist
Document list:
Message:

A new checklist item has been created for this project phase, for training purposes.

Attachments:

** DOH cannot guarantee that documents that have been uploaded to NYSE-CON are virus free. Before documents are opened, the user should ensure that their anti-virus software is operating and is up-to-date with the latest anti-virus signature files.

Figure 61: Windows browser to find attachment on the computer.

Appendix _1

Referencing the Survey Schedule History Table

Learning Objective	Step	Action																																													
<p>How to View the History of survey activity</p>	<p>1</p>	<p>The 'Survey' table (containing the history of schedules specific to each survey) is located in the bottom frame of the General Information Page.</p> <div data-bbox="495 520 1513 697" style="border: 1px solid gray; padding: 5px;"> <p>Survey</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Required</th> <th>Scheduled Date</th> <th>Confirm Date</th> <th>Reviewer</th> </tr> </thead> <tbody> <tr> <td>▶ Environmental</td> <td>✓</td> <td>02/06/2017</td> <td></td> <td>Review ECON</td> </tr> <tr> <td>▶ Clinical</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>▶ Administrative</td> <td>✓</td> <td>08/12/2016</td> <td></td> <td>Review ECON</td> </tr> </tbody> </table> </div> <p style="text-align: center;"><i>Figure 62: Survey table</i></p>	Type	Required	Scheduled Date	Confirm Date	Reviewer	▶ Environmental	✓	02/06/2017		Review ECON	▶ Clinical					▶ Administrative	✓	08/12/2016		Review ECON																									
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▶ Environmental	✓	02/06/2017		Review ECON																																											
▶ Clinical																																															
▶ Administrative	✓	08/12/2016		Review ECON																																											
	<p>2</p>	<p>All survey activity (schedule, confirm, re-schedule, and cancel) appears in the survey table. The history of survey activity is maintained.</p> <p>The survey information appears as follows:</p> <ul style="list-style-type: none"> Type of survey(s) selected for the project (Marked with '✓') <i>This tick mark appears even if the survey(s) are not scheduled yet. They are indicative of the survey(s) that are selected for the project by the Regional Office staff.</i> The Scheduled date - the date is created when the reviewer first schedules the survey and is updated every time the survey is rescheduled. Name of the reviewer <p>*Note: A toggle {▶} button is provided so, when clicked, the survey history will be expanded.</p> <div data-bbox="495 1234 1495 1507" style="border: 1px solid gray; padding: 5px;"> <p>Survey</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Required</th> <th>Scheduled Date</th> <th>Confirm Date</th> <th>Reviewer</th> </tr> </thead> <tbody> <tr> <td>▼ Environmental</td> <td>✓</td> <td>02/06/2017</td> <td></td> <td>Review ECON</td> </tr> <tr> <td></td> <td></td> <td>02/08/2016</td> <td>07/04/2015</td> <td>Review ECON</td> </tr> <tr> <td></td> <td></td> <td>08/12/2016</td> <td></td> <td>Review ECON</td> </tr> <tr> <td>▼ Clinical</td> <td>✗</td> <td>12/13/2015</td> <td></td> <td>Review ECON</td> </tr> <tr> <td></td> <td></td> <td>12/13/2015</td> <td></td> <td>Review ECON</td> </tr> <tr> <td>▼ Administrative</td> <td>✓</td> <td>08/12/2016</td> <td></td> <td>Review ECON</td> </tr> <tr> <td></td> <td></td> <td>08/12/2016</td> <td></td> <td>Review ECON</td> </tr> <tr> <td></td> <td></td> <td>08/12/2016</td> <td></td> <td>Review ECON</td> </tr> </tbody> </table> </div> <p style="text-align: center;"><i>Figure 63: Records created for Surveys Scheduled</i></p>	Type	Required	Scheduled Date	Confirm Date	Reviewer	▼ Environmental	✓	02/06/2017		Review ECON			02/08/2016	07/04/2015	Review ECON			08/12/2016		Review ECON	▼ Clinical	✗	12/13/2015		Review ECON			12/13/2015		Review ECON	▼ Administrative	✓	08/12/2016		Review ECON			08/12/2016		Review ECON			08/12/2016		Review ECON
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